

COMMUNITY ACTION OPPORTUNITIES – WEATHERIZATION PROGRAM  
CONTRACT ADDENDUM

**HEATING, VENTILATING, & AIR CONDITIONING (HVAC) PROPOSALS**  
**PART 1**  
**CLEAN, TUNE, & EVALUATE SERVICE CALL**  
**SPECIFICATIONS & PROPOSAL**

A “Clean, Tune, & Evaluate” service call involves visual inspection, testing procedures, cleaning, and adjustments to improve the operating efficiency of the heating system, including the combustion apparatus of fuel fired systems. To perform a “Clean, Tune, & Evaluate” service call, a licensed mechanical contractor will perform the following steps, as may be applicable to the type of heating equipment being serviced:

1. Check for gas, oil, and/or water leaks;
2. Check for leaks in the heat exchanger;
3. Check venting system;
4. Check ducts/pipes (supply and return);
5. Check power supply/wiring; check electrical heating elements;
6. Check for safety factors (i.e., clearance from combustibles);
7. Ensure adequate fuel supply to the control valve;
8. Clean the fire tubes, burner ports, heat exchanger, squirrel cage, combustion chamber, cabinet, blower housing and motor;
9. Adjust burner and fuel input (set manifold pressure to manufacturer's specs);
10. Adjust the pilot light and/or
11. Adjust the combustion blower (for power blower);
12. Replace the filter(s) if necessary (filters will be supplied by the agency)
13. Lubricate fans, motors, and pumps;
14. Check and adjust and/or replace belts (if worn);
15. Check and adjust thermostat;
16. Check blower and high limit controls;
17. Check the pressure regulator;
18. Check for adequate combustion air and adjust burner air shutters;
19. Use a combustion analyzer to set furnace efficiency;
20. Check the temperature rise (within the range listed on the furnace rating tag); and
21. Adjust the thermostat heat anticipator with the use of an amp probe.

A typical service call should result in a clean squirrel cage, return air plenum, combustion chamber, cabinet, heat exchanger, gas burners, oil filters, and return air filter. The tune-up should adjust proper BTU input, replace defective wiring leading to the heating unit, set oil pump pressure in accordance with the manufacturer's specifications, replace the burner orifice if the unit is over or under fired, repair or replace sections of the venting (chimney) system that are ineffective or unsafe, ensure proper draft, ensure and/or adjust combustion efficiency, assure properly operating limit controls and/or automatic fuel safety shut-off/boiler controls. Upon completion of the tune-up, the furnace should be performing within 5 percent of the manufacturer's AFUE rating or a minimum 70 percent, steady state efficiency.



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**HEATING, VENTILATING, & AIR CONDITIONING (HVAC) PROPOSALS  
PART 2  
NEW OR REPLACEMENT HEATING EQUIPMENT SYSTEMS  
SPECIFICATIONS AND PROPOSAL GUIDELINES**

If the agency has determined that the existing heating equipment is “beyond repair” and must be replaced, the agency will seek proposals from three pre-approved contractors to replace the equipment. When feasible, the replacement equipment should be of the same type and size as the original equipment, however, the following must apply:

1. All new or replacement HVAC installations shall be performed in accordance with all applicable State and local codes. All materials used must meet or exceed 10 CFR 440 Appendix A: “Standards for Weatherization Services”
2. Permits will be required as applicable by local building code. It will be the responsibility of the Contractor to ensure that necessary permits have been secured prior to commencement of work. This cost must be included in the proposal.
3. New heating equipment shall be sufficiently sized; contractor is responsible for properly sizing unit using a Manual J or other heat load calculation.
4. Contractor is responsible for removing all existing equipment that is to be replaced, and hauling away. Systems containing refrigerant and/or other hazardous materials must be properly disposed of according to all applicable environmental standards, including recovery of refrigerants and disablement of refrigerant compressors.
5. Furnish and install new heating equipment, complete, with not less than 90% efficiency rating, in the same location as that being replaced.
6. Installation shall include new supply and return plenums if necessary for proper operation of the furnace (existing ductwork shall be utilized if it is adequate).
7. Installation shall include all fuel and electrical connections, a new thermostat, and proper venting.
8. All ducts shall be mechanically secured and sealed, and properly attached to boots and heating risers.
9. Inspect all existing fuel lines that supply the furnace and replace any that are corroded or of the wrong type of pipe. The Contractor shall be responsible for ensuring properly sized fuel line is supplying the heater and shall inform the agency in the event that existing line is improperly sized.

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10. All venting and combustion air shall be installed in accordance with all applicable codes. New gas forced air furnaces shall have pilotless ignition.
11. All duct work connections and holes shall be sealed, on all sides, with a non-toxic, DOE industry approved, mastic duct sealant applied per manufacturers specifications.
12. Contractor is responsible for leaving the job site clean, hauling away job debris, and existing equipment (if applicable) and for properly disposing of existing equipment to meet EPA regulations (as stated above in item 4).
13. The Contractor shall leave all literature including warrantee on equipment with the customer and shall instruct customer of proper care and maintenance required on equipment.
14. Project commencement and completion must be accomplished within 10 working days of notice to proceed.

ALL PROPOSALS SHALL CONTAIN THE FOLLOWING MINIMUM INFORMATION:

1. Manufacturer brand names, model numbers, SEER ratings, and capacity for any/all equipment.
2. Complete cost of installed system with labor and materials/equipment cost itemized separately.

Proposals of comparable systems will be considered, and contracts will be awarded at the discretion of the agency, dependent upon competitive pricing for comparable work.

If your firm agrees to the above conditions and would like to be considered for Heating Equipment Replacement Projects, please sign and date below:

x \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_  
(Title)

\_\_\_\_\_  
(Firm Name)

If approved, this document will be attached to and become part of a vendor agreement.